

Discussion Document

IRS Taxpayer Assistance Blueprint (TAB)

Project Overview

Washington DC
November 16, 2005



The team has outlined the project scope in the context of current IRS business planning and customer service activities

Scope	
<ul style="list-style-type: none">▶ This project will focus on individual taxpayer and practitioner services and the associated delivery channels▶ Taxpayer services have been defined as<ul style="list-style-type: none">– (1) Tax Law Assistance,– (2) Account Inquiry,– (3) Return Preparation,– (4) Outreach & Education, and– (5) Tax Forms & Publications (distribution only)	<ul style="list-style-type: none">▶ This project will include:<ul style="list-style-type: none">– Individual Taxpayer services– Current and potential delivery channels▶ This project will not include:<ul style="list-style-type: none">– Processing– Tax Forms & Publications (development)– Large Business, Corporations, Partnerships, Trusts, Tax Exempt Organizations, and Government Entities– Compliance business processes / functions– Defining the impact of services on compliance

OPERA is undertaking the research effort to quantify the linkage between customer services and the impact those services have on taxpayer compliance



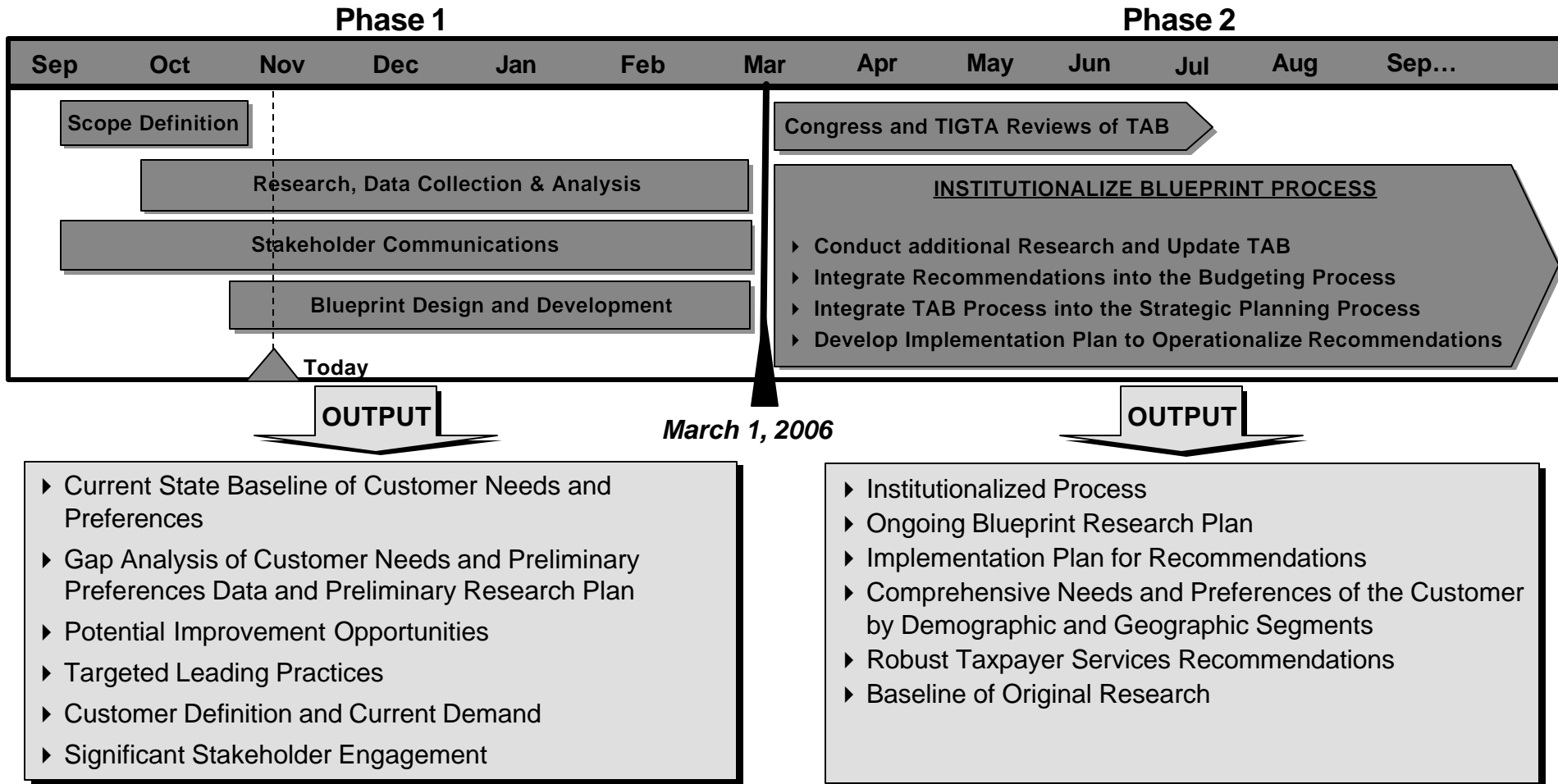
The success of the project will be determined by acceptance of the Blueprint's methodology and development of recommendations that stakeholders define as valuable

Objectives

- ▶ Develop a **credible baseline** by assessing current service offerings and delivery channels, and **customer needs, behaviors, and preferences** across various demographic segments
- ▶ Develop **long term metrics** by which the effectiveness of taxpayer assistance can be gauged
- ▶ Develop a **repeatable and reliable process** that can be **institutionalized and integrated** into the IRS' existing strategic planning and budgeting processes to ensure the continuous evaluation of taxpayer assistance
- ▶ Develop recommendations and plan for **addressing gaps in customer needs and preferences**, and **evaluate innovative approaches to assistance** that will be implemented over the next 2 – 5 years
- ▶ Assess the impact of the recommendations on current and future **planning, funding, and modernization processes**



We must establish realistic expectations for the March 1 Blueprint – Given the available time, the project is best defined by two distinct phases...



...The two phases will address different aspects of the Congressional Directive

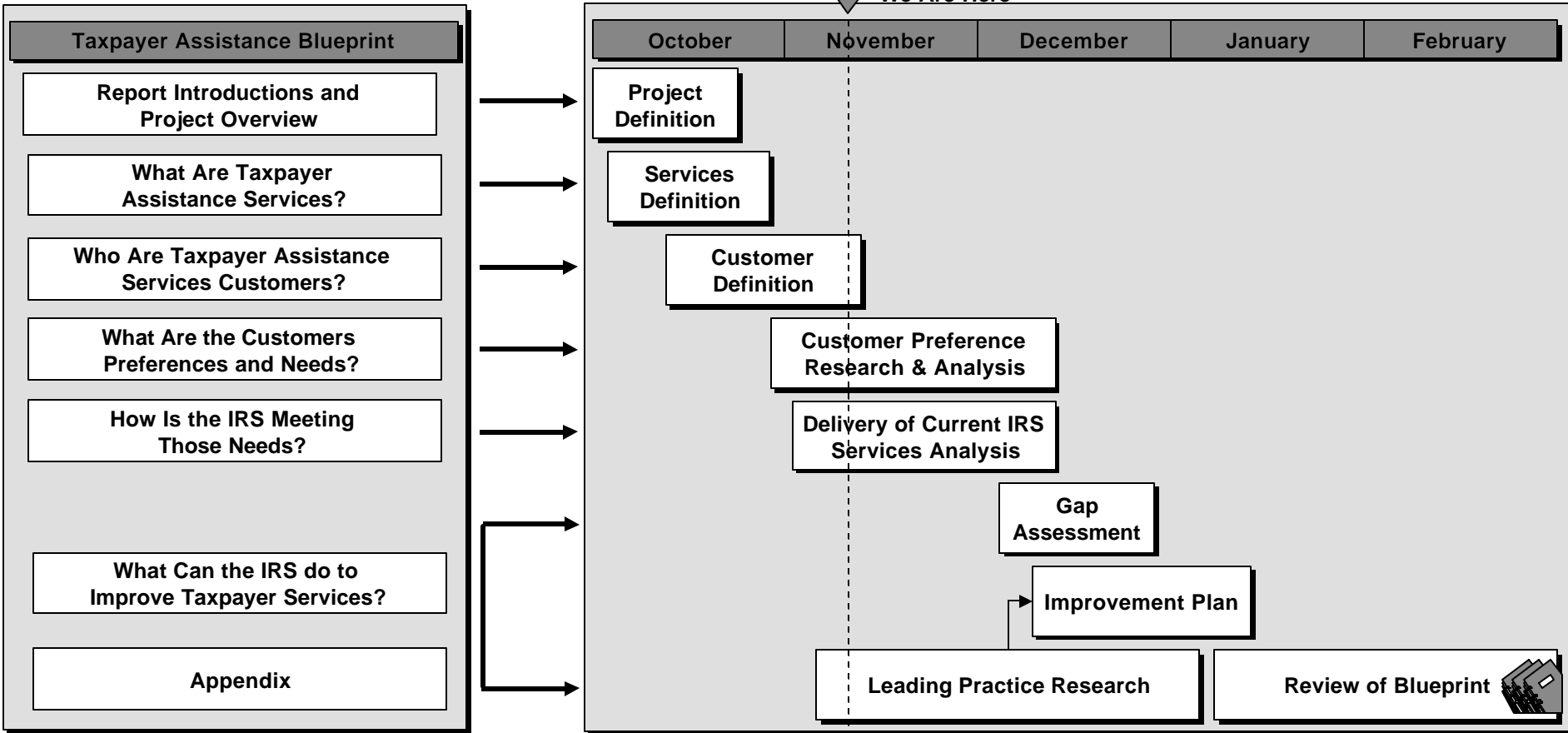
Phase	Congressional Directive	Additional Explanation
Phase 1 (March 1, 2006)	Review the IRS's current portfolio of taxpayer services and develop a five-year plan	<ul style="list-style-type: none">▶ The plan will include potential improvement opportunities based on analysis of available secondary research and leading practice data▶ Additional original research and testing will be necessary to refine improvement opportunities
Phase 2 (~Oct. 2006)	Explain the potential impact of proposed service reductions	<ul style="list-style-type: none">▶ The TAB team will not address the specific impact of the suspended TAC closures on taxpayer assistance or compliance▶ OPERA is currently providing research on the impact of taxpayer services on compliance that will be incorporated/referenced in the blueprint
Phase 2 (~Oct. 2006)	Detail how the IRS plans to meet the service needs on a geographic basis	<ul style="list-style-type: none">▶ Recommendations on specific geographies, resource planning, etc. will be addressed in Phase 2 with additional research



The Blueprint will identify customer preferences for tax administration services and assess the IRS's ability to meet those needs

Specific sections of the blueprint will be driven by project activities...

...Project activities will define the customer and their needs as well as assess the current delivery of those services



The March 1 Blueprint will outline preliminary improvement opportunities to address gaps between customer needs and current service delivery performance



The TAB Team is making progress and has achieved several very important accomplishments

Accomplishments

- ▶ Received Commissioner approval of project charter on 10/21/05
- ▶ Completed initial TAB Blueprint Structure
- ▶ Identified preliminary data sets available to draw customer preferences and current performance data
- ▶ Initiated a leading practices study and initiated contact with several organizations (e.g., Australian Tax Authority, Thai Tax Authority, SAT Mexico, FAA, EPA, Wachovia, American Express)
- ▶ Created a stakeholder engagement plan
- ▶ Finalized internal and external communication materials
- ▶ Established and tested internal and external e-mail addresses to receive customer/partner feedback
- ▶ Conducted a briefing with NTEU and received confirmation to proceed
- ▶ Finalized an Employee Survey
- ▶ Sent a Stakeholder Survey to NPL for distribution to IRSAC, IRPAC, and NPL Liaison Group
- ▶ Met with TAP Representative
- ▶ Established liaisons to work with and remain current on project activities of other strategic initiatives (e.g. Modernization Vision and Strategy Task Force and JOC)



Communication to stakeholders will drive awareness and understanding and provide a mechanism for input and feedback

Stakeholder Engagement

Audience Group	Stakeholder	
<i>Internal Parties</i>	<ul style="list-style-type: none"> ▶ AM Workload Planning ▶ State Governments, Fed State, Government Liaison ▶ IRS Employees and Executives ▶ Legislative Affairs ▶ LITC ▶ NTA ▶ NTEU 	<ul style="list-style-type: none"> ▶ RAS / OPERA ▶ Stakeholder Liaison ▶ Strategy & Finance ▶ SMEs ▶ Taxpayer Burden ▶ Vision & Strategy Task Force ▶ W&I Research
<i>Oversight Bodies</i>	<ul style="list-style-type: none"> ▶ Center for Budget and Policy ▶ Congress – Key Staffers ▶ ESC ▶ GAO ▶ IRS Oversight Board 	<ul style="list-style-type: none"> ▶ IRSAC ▶ Main Treasury ▶ OMB ▶ Project Leadership ▶ TIGTA
<i>Partners & Intermediaries</i>	<ul style="list-style-type: none"> ▶ Brookings ▶ EITC Program ▶ Multi-Lingual Initiative 	<ul style="list-style-type: none"> ▶ SPEC Partners ▶ NPL ▶ Tax Practitioners
<i>Taxpayers</i>	<ul style="list-style-type: none"> ▶ Individual Taxpayers ▶ TAPS 	
<i>Other</i>	<ul style="list-style-type: none"> ▶ Public Media ▶ TAB Project Team 	<ul style="list-style-type: none"> ▶ Modernization Vision and Strategy Task Force ▶ TAC Model Project

...Including integration with other key IRS strategic initiatives such as the *Modernization Vision and Strategy Task Force*



The stakeholder engagement effort is currently underway with key communication events confirmed into December 2005 and planned into April 2006

TAB Stakeholder Engagement Schedule

Confirmed

Date	Stakeholder	Purpose
9/20	National Taxpayer Advocate	Engage NTA as a Stakeholder
10/18	AARP Regional Meeting	Introduce TAB
10/18	Modernization Vision & Strategy Task Force	Debrief to Determine Synergies
11/7	SPEC Survey	Solicit Feedback from All Existing TAP Members
11/8	NTEU (Colleen Kelly)	Overview, Focus Groups, Employee Survey
11/8	Communications Liaison Disclosure	Introduce TAB
11/14	W&I Commissioner/ Deputy Commissioner	Review Methodology
11/15	TIGTA	Receive Information on TAC Closure Effort
11/15	National Community Tax Coalition Representatives	Introduce TAB and Obtain Feedback/Input
11/16	IRSAC Working Session & Public Meeting	Introduce TAB and Obtain Feedback/Input
11/16	NPL Stakeholder Advisory Committee	Introduce TAB and Obtain Feedback/Input
11/16	IRS Oversight Board	Introduce TAB and Obtain Feedback/Input
11/17	IRS Commissioner/Deputy Commissioner	Introduce TAB and Obtain Feedback/Input
12/7	LITC National Meeting and Plenary Session	Introduce TAB and Obtain Feedback/Input
12/7	TAP Town Hall Area 2 (Philadelphia)	Solicit Feedback from Exit Interviews



Next Steps

- ▶ Provide updates to the group regarding TAB progress
- ▶ Respond to the group's questions and concerns

